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ABSTRACT

Adult educators are becoming increasingly aware of the fact that adult learners, not institutions, initiate the process of adult education and that they determine the ends to be accomplished by their participation. Researchers have shown that the decision to participate in adult education comes about as a result of a variety of social and environmental factors. Perhaps McClusky's Theory of Margin can give a fresh perspective when it is applied to a model of participation in adult education. Margin, which is the difference between an individual's aggregate load (obligations) and power (social, mental, physical, economic, and life skills), is a factor that can make the difference between choosing to participate in a learning endeavor or not. A diagnostic instrument designed to measure an individual's margin could serve as a valuable tool that would enable educational brokers to assist adult learners in defining goals, setting objectives, and gaining access to learning resources. The Theory of Margin is applicable in an identification of an individual's potential participation in adult education inasmuch as the following participation factors are components of either load or power: socioeconomic status, learning press, attitude toward the value of adult education, readiness to participate in adult education, and participation stimuli. Thus, cooperative diagnostic tools for measuring margin could contribute greatly to the educational brokering process. (MN)

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AN INQUIRY INTO A CO-OPERATIVE DIAGNOSTIC TOOL BASED ON MCCLUSKY'S THEORY OF MARGIN TO FACILITATE ADULT EDUCATIONAL BROKERAGE SERVICES

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This paper explores the relationship between current definitions of adult education, participation patterns in adult education (formal and informal), and Howard McClusky's "Theory of Margin." A major focus of the paper revolves around the rationale for encouraging the development of co-operative diagnostic tools for measuring Margin and for assisting facilitators of adult learning, especially educational brokers. It concludes that adult education is being redefined, that the parameters for participation in adult education are expanding and can, perhaps, best be understood in light of McClusky's Margin Theory, and that instruments which would measure Margin should be developed.

INTRODUCTION

Adult education no longer is the step child of "legitimate" education, i.e., of primary, secondary, and higher education. Indeed, included in the concept of lifelong learning, it has become a national imperative (National Commission on Excellence in Education, 1983). Today adults are being asked to adjust to an accelerated amount of change in their lives (Knowles, 1980; Toffler, 1970), to new sets of societal norms (Yankelovich, 1981), to major life stages and transitions (Sheehy, 1976; Levinson,1978; Aslanian and Brickell,1980), as well as to career and technological changes (Toffler, 1980; Naisbett, 1982). To do so, adults are encouraged to continue their education.

DEFINING ADULT EDUCATION

For a great many years the term adult education has been defined AS the activities sponsored by an assortment of agencies, primarily the public schools, community colleges, and universities. (Day, 1984) Such a definition was popularized by the writings of Coolie Verner; he viewed adult education as the "relationship between an educational agent and a learner in which the agent selects, arranges, and continuously directs a sequence of progressive tasks that provide systematic experiences to achieve learning...." (Verner, 1964) Those familiar with the 1979 and

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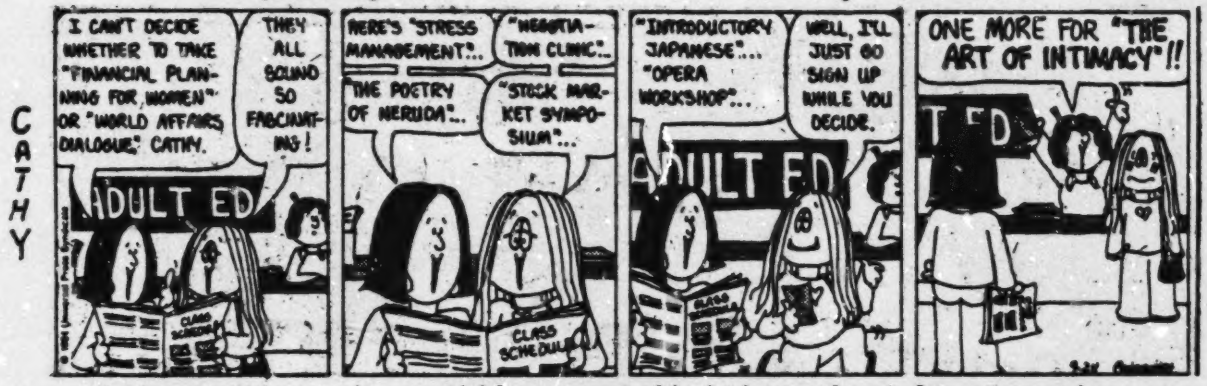
1982 State of the Art of Adult Education in Wyoming might recall similar "activity" definitions of adult education; adult education was defined as:

> ...formal instruction involving an instructional agent and consisting of three or more continuous sessions for adults who were not full-time students. (1979:1)
> ...all learning experiences sponsored for adults by a variety of institutions and agencies dedicated to improving the individual and society. (1982:1)


I CAN'T DECIDE WHETHER TO TAKE "FINANCIAL PLANNING FOR WOMEN" OR "WORLD AFFAIRS DIALOGUE," CATHY.
THEY ALL SOUND SO FABCINATING!
ADULT ED
CLASS SCHEDULE
HERE'S "STRESS MANAGEMENT"...
"NEGOTIATION CLINIC"...
"THE POETRY OF NERUDA"...
"STOCK MARKET SYMPOSIUM"...
CLASS SCHEDULE
"INTRODUCTORY JAPANESE"...
"OPERA WORKSHOP"...
WELL, I'LL JUST GO SIGN UP WHILE YOU DECIDE.
ADULT ED
ONE MORE FOR "THE ART OF INTIMACY"!!
T ED

CATHY

But now there is a different definition of adult education surfacing, one which focuses on process, on ends, and on the the adult learner. (Day, 1984) It is not sufficient for us to identify adult education with institutionally-sponsored activities. There is a growing awareness and acceptance that adult learners, not institutions, initiate the process that IS adult education, and that they determine the ends to be accomplished. The following definition of Darkenwald and Merriam (1982) appears to be becoming much more relevant:

> Adult Education is a process whereby persons whose major social roles are characteristic of adult status undertake systematic and sustained learning activities for the purpose of bringing about changes in knowledge, attitudes, values, or skills. (9)

This definition recognizes that a great deal of adult education goes on outside those institutional activities noted earlier. It recognizes that adults are capable of directing their own education and that agencies often play but a minor role in these endeavors. Tough (1982) notes that, "although only about 10% of adult learning efforts are guided by an instructor in a group, this is the sterotype of adult learning that first comes to mind." (126)

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PARTICIPATION PATTERNS IN ADULT EDUCATION

The "activities" definition of adult education has also led us to look narrowly at who participates in adult education. Referring to the work of K. Patricia Cross, Aslanian and Brickel (1980) identify the typical participant of adult education as: "young, white, well-educated, rich, live in the West, reside in suburbs, and work longer hours." (9) This is, perhaps, a profile of adults who participate in institutionally-structured activities. But it is not a very accurate profile of the individuals who participate in adult education. Tough (1971) concludes from his investigations into adult learning participation patterns that, "almost everyone undertakes at least one or two major learning efforts a year...." (1) Tough is considering both institutional and learner designed projects. Tough is also centering his investigations on material learned, not on courses completed, C.E.U.s, or other "institutional artifacts." (Cohen and Brawer)

"In order to understand why adults engage in education, we need to specify the nature of the factors that affect participation, how they are related to one another and how they operate to affect actual behavior." (Darkenwald and Merriam (1982:141)

In this light, Darkenwald and Merriam devised their Psychosocial Interaction Model of Participation in organized Adult Education. Noting that "a model might be thought of as a rough version of a theory," (141) they delineate the following components: PreAdulthood Factors, Socioeconomic Status Factors, Learning Press, Perceived Value of Adult Education, Readiness to Participate, Participation Stimuli, and Barriers. The combination of these factors yields the Probability of Participation.

As components of their model, Darkenwald and Merriam note that Pre-Adulthood factors are the "...conventional social science generalizations concerning the status attainment process." (142) Socioeconomic Status impacts upon Learning Press. "Learning Press is defined as the extent to which one's total current environment requires or encourages further learning." (142) Darkenwald and Merriam proceed on the assumption that one in a higher socioeconomic status is subject to a higher Learning Press.

These factors just mentioned deal with social or environmental factors that are generally not within the realm of the professional adult educator. In most cases, they become part and parcel of the adult as he/she matures and, as such, are determined before adulthood.

The last four factors--Perceived Value of Adult Education and

Readiness to Participate, along with Participation Stimuli and Barriers to Participation--are, to a greater extent, subject to influence by professional adult educators.

Darkenwald and Merriam believe that the Perceived Value of Adult Education is influenced by the Socioeconomic Status of the adult and the Learning Press within his/her environment. This, in turn, influences the Readiness to Participate of the adult learner.

Participation Stimuli are those "triggers" (Asianian and Brickell) that motivate the adult to action. It is at this point that the adult learner may encounter Barriers. The yield of this model, when all is considered, is the Probability of Participation.

Today we know many of the reasons why people participate in institutional activities. Houle (1961) identified three learning orientations around which his adult students clustered. They were: goal-directed, activity-oriented, and learning-oriented. But we are only beginning to understand why people initiate non-institutionally-sponsored adult education. Tough provides some answers. But perhaps McClusky's Theory of Margin can give a fresh perspective when it is applied to a model of participation in adult education.

MARGIN*

"All very well and good—but now we come to chart B."
(Gahan Wilson)

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* McClusky's Differential Psychology of Adult Potential, from whence we extract the Theory of Margin, includes the additional concepts of COMMITMENT, TIME PERCEPTION, CRITICAL PERIODS, and SELF CONCEPT. An introduction to these other facets of the Differential Psychology can be found in Appendix C of Malcolm Knowles' "The Adult Learner: A Neglected Species."

Margin is best defined by defining its components, Load and Power.

Load factors are external and internal. External Load factors are the "normal" obligations of life imposed by one's society, family, job, and the like. Internal Load factors are the expectations and demands set by oneself. Collectively, then, one's Load is composed of the "burdens of life."

Power factors are the strengths available to bear the Load. They can be physical, social, mental, economic, and life's skills accumulated as one matures.

One's Margin, as in "margin of safety", is the difference between aggregate Load factors and aggregate Power factors. If one has more Power than Load, one has choice, breathing room, autonomy. If one's Load exceeds Power, one has trouble. It is Margin, we believe, that really determines if an adult will participate in a learning project.

At one time or another, we all have heard (or said) one or more of the following: "Give me some slack!", "Get off my back!","I can't take any more!", "Give me a break!" In terms of the Theory of Margin, these exclamations mean, "Make changes in my Load or Power to increase my Margin."

Very low or negative Margin would make it very difficult for an adult to initiate or participate in a learning endeavor. Positive Margin, then, allows choice that comes from a degee of autonomy. (Day & James, 1984)

THE EDUCATIONAL BROKER

Generically, Darkenwald and Merriam say, "The need for more and better information on educational opportunities has resulted in the rapid development of community-based educational information centers. What these centers are actually called, what they do, who sponsors them, how they are financed, and so on varies greatly. All of them, however, serve in one way or another as brokers--that is, they attempt to match the need and interests of learners with appropriate educational resources in the community." (138)

With more specificity, Heffernan (1981) delineates core brokering functions as "defining goals for the learner, setting objectives for education and training, selecting learning experiences to attain competencies, and gaining access to the appropriate learning opportunities." (25)

A TOOL FOR MEASURING MARGIN

The present on-going inquiry is exploring the ramifications of designing an instrument/method for an educational broker to measure the various aspects of an adult's Margin in order to be better able to provide the best possible educational brokerage service. Using the concept of Margin as a tool to collaboratively assist an adult learner in defining goals, setting objectives, and gaining access to learning resources, a professional educational broker could go along way toward providing optimal service to his/her client.

The changing definition of adult education emphasizing individual goals over institutional goals, the emerging role of the educational broker to professionally assist adult learners, the increasing knowledge base regarding participation in adult education come together in the application of McClusky's Theory to the participation model of Darkenwald and Merriam.

In each and every category of the Model, the Theory of Margin is applicable. An adult's socioeconomic status and his/her attitude toward it is either a component of Load or Power. The magnitude of his/her Learning Press, in either a positive or negative orientation, directly affects her Margin. A positive orientation toward the Value of Adult Education would be part of her Power. Her Readiness to Participate, or lack thereof, would adjust her Margin; the Participation Stimuli, or "triggers," in her life can be either Load or Power; and Barriers, by definition, are Load factors. At this point, after consideration of the Load versus Power equation, we have Margin, or what Darkenwald and Merriam call the Probability of Particiaption. In the aggregate, if Margin is positive, the adult will more likely participate. Undoubtedly, an educational broker having an appropriate understanding of these Margin constituents and their application in helping an adult learner will make a greater contribution to helping than one who is not familiar.

CONCLUSION

In this paper we have attempted to illustrate that the focus of adult education is shifting from the agencies which sponsor educational activities for adults to the adult learners themselves--also, stressing ends and new roles for adult educators. As a nation we are recognizing, and soon may be supporting, the concept of lifelong learning. With this change in focus comes the realization that a great deal of adult learning is self-directed and does not involve institutionally-sponsored classes. We must therefore understand that emphasis on program development is no longer a sufficient response to the needs and concerns of adult learners in our communities. We must also

understand that the energy it takes to participate in learning projects involves not just available courses but a degree of control (Margin) in the lives of learners. Assessing participation patterns in adult learning projects should, therefore, begin with individual learners. Cooperative diagnostic tools for measuring Margin, as we have suggested, shall contribute to this process.

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